

Managed Markets Headcounts & Organizations Study – Winter 2011

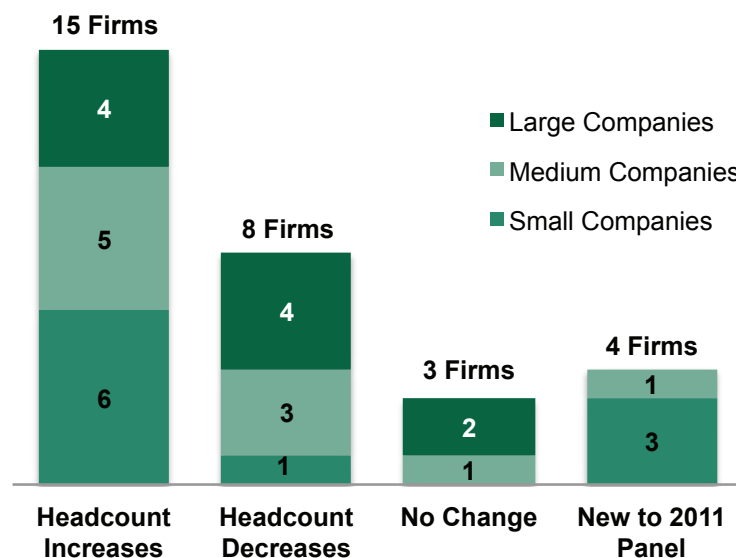
Managed Markets Headcounts Steady Across 30 Leading Firms in 2011, Though Large & Medium Firms Had Modest Average Declines

Overall Managed Markets headcounts for the 30-company panel held steady in 2011, after adjusting for changes in panel composition and category additions from 2010 to 2011. However, the headcounts picture differs notably by the size of the company.

- **Small pharma companies' Managed Markets headcounts grew by +4%** (after adjusting for panel/category changes), **while Large and Medium sized firms had adjusted average declines in headcounts of -1%.**
- Seven of the eight companies that reported decreases in headcounts in 2011 were Large or Medium firms.

**Managed Markets
& National
Accounts Service**

**NUMBER OF FIRMS IN 2011 PANEL
BY CHANGE IN HEADCOUNTS (2011/2010)**



Source: HIRC, *Managed Markets Service*, Winter 2011.

About HIRC

Health Industries Research Center (HIRC) conducts strategic market research on trends in health care, pharmaceuticals, and managed care businesses.



HIRC

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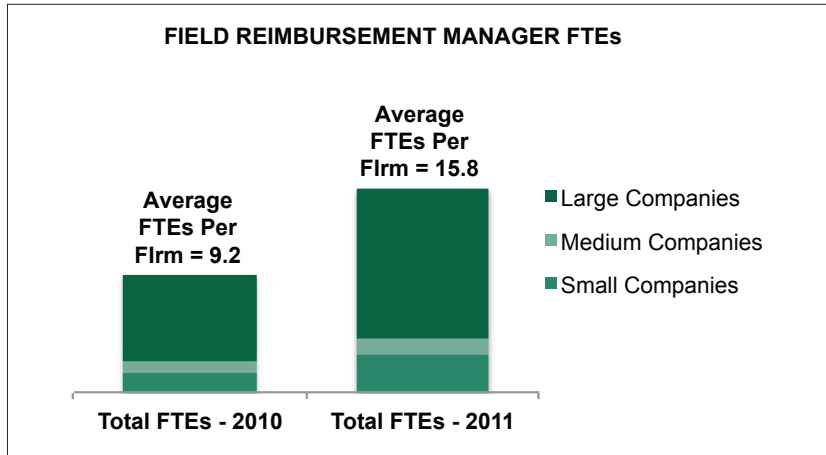
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Account Management and Marketing Headcounts Drop Among Larger Firms

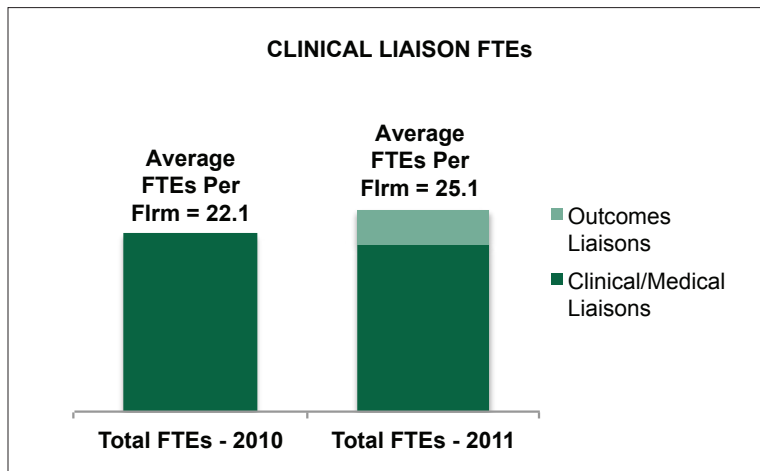
Account Management and managed markets Marketing areas had the largest declines in FTEs in 2011. The drop in Account Management headcounts was primarily due to reductions at Large companies and a notable cut made by one Medium firm. Similarly, reductions in Marketing headcounts at four Large firms accounted for most of the overall decline in Marketing FTEs.

Companies Invest in Staffing to Support Reimbursement and Access

Headcounts for customer Reimbursement Support increased notably among all sizes of firms in 2011, with companies more than doubling Field Reimbursement Manager headcounts to help address reimbursement challenges at health plans and other customers.



Clinical Liaison headcounts also rose in 2011, due to additional Outcomes Liaison FTEs. These liaisons are typically charged with developing and communicating outcomes information and support for brands with key customers.



Report Methodology and Availability

HIRC surveyed more than 30 leading pharmaceutical companies during September through November 2011, regarding their Managed Markets headcounts and organizational structures. Each firm's data are privacy-protected, and results are reported in aggregate to protect confidentiality. Participating firms receive a custom, confidential analysis of their firm's headcounts vs. a cohort of competitors. The complete Managed Markets Headcounts and Organizational Study was released in December 2011, and is available to subscribers at www.hirc.com.

About HIRC's Managed Markets & National Accounts Service

Managed Markets and National Accounts is the most comprehensive research service available to help pharmaceutical firms assess performance and stay abreast of trends within a multitude of managed care, government and institutional markets. Surveys and interviews conducted with:

- Health Plan Pharmacy Directors
- Health Plan Medical Directors
- PBMs
- Medicare PDPs
- Medicaid MCOs
- State Medicaid Directors
- Specialty Pharmacies
- Hospital Pharmacists
- LTC Consultant Pharmacists
- Retail Drug Chains
- Physician Medical Groups (PMG)

Key reports include:

- *Ratings of Manufacturers on Contracting & Programs*
- *Customer Needs Assessment*
- *Pharma's Ratings of Customers*
- *Market Segment Situation Analyses*
- *Future Scenarios*
- *Headcounts & Organizations*

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